Therapist Notes User Manual

Version 1.97

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1.0 Installing Therapist Notes

The Therapist Notes application is supported in a Windows XP, Windows Vista, Windows 7, and Mac OS environment.

To install Therapist Notes in a Windows environment, do the following:

1. Open your internet browser and go to http://www.proficienthealth.com/downloads/TherapistNotes-Install.exe to download the latest version of the Therapist Notes application to your computer.
2. Depending on your security settings and browser, you may be asked to run or save the TherapistNotes-Install.exe file. Select **Save**.

3. When the application has downloaded, select the option to **Run** the TherapistNotes-Install.exe file. The Therapist Notes Setup window will be displayed.

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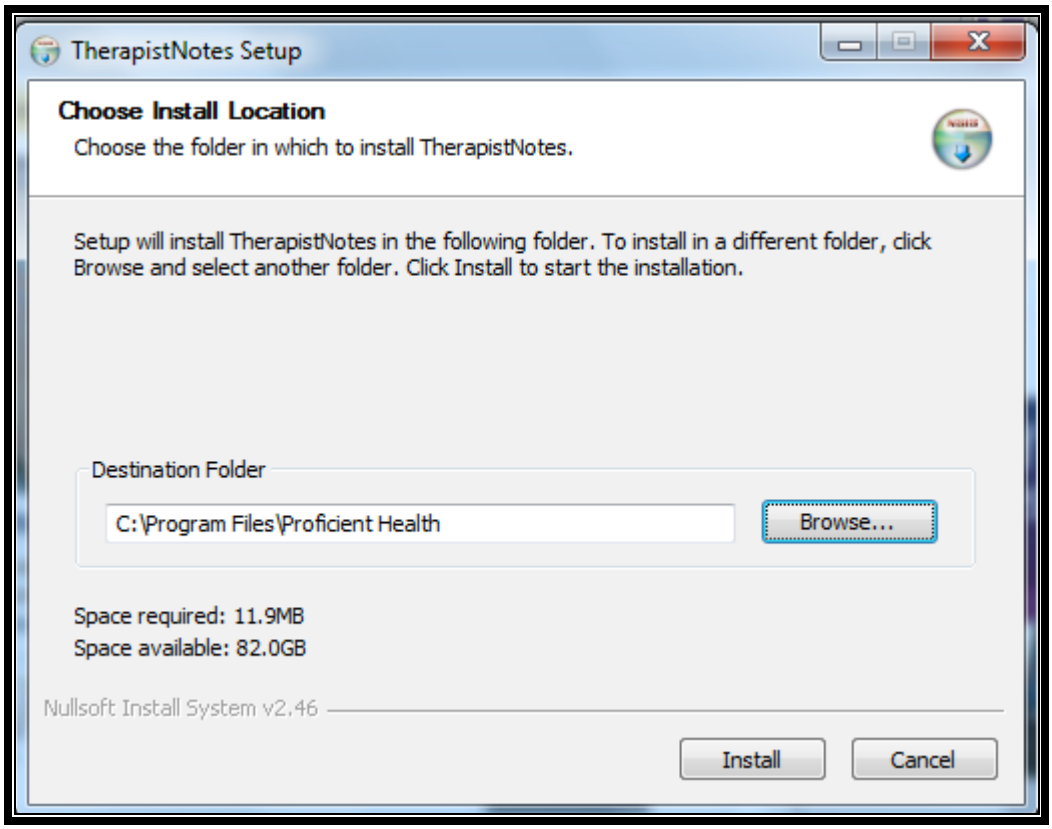
TherapistNotes Setup
Choose Install Location
Choose the folder in which to install TherapistNotes.
Setup will install TherapistNotes in the following folder. To install in a different folder, click Browse and select another folder. Click Install to start the installation.
Destination Folder
C:\Program Files\Proficient Health
Browse...
Space required: 11.9MB
Space available: 82.0GB
Nullsoft Install System v2.46
Install
Cancel

4. Keep the Destination Folder set to **C:\Program Files\Proficient Health** profiled in as the default location.
5. Click **Install**.
6. When the setup shows **Installation Complete**, click the **Close** button.

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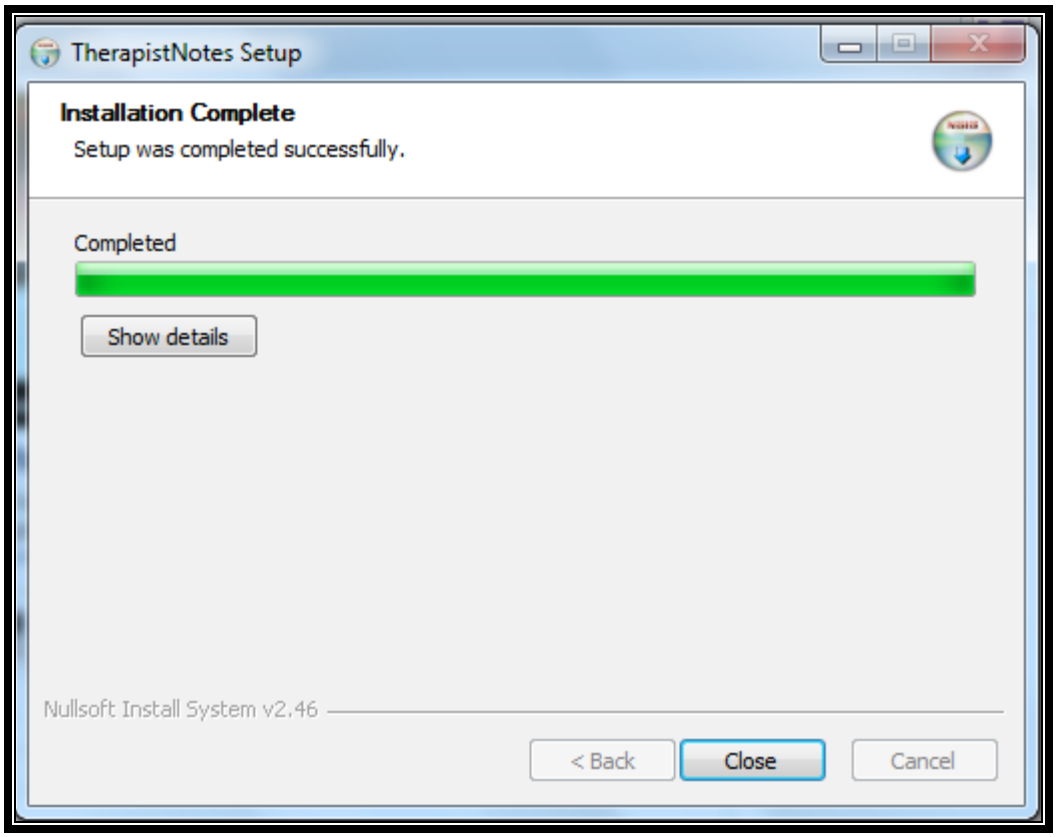

7. Open the Therapist Notes application found either on your Start Menu, or under Program Files/Proficient Health/TherapistNotes to run the latest release.

To install Therapist Notes in a Mac environment, do the following:

1. Open your internet browser and go to http://www.proficienthealth.com/downloads/TherapistNotes.dmg to download the latest version of the Therapist Notes application to your Downloads folder.

2. Open the TherapistNotes.dmg disk image file. The following panel will be displayed:

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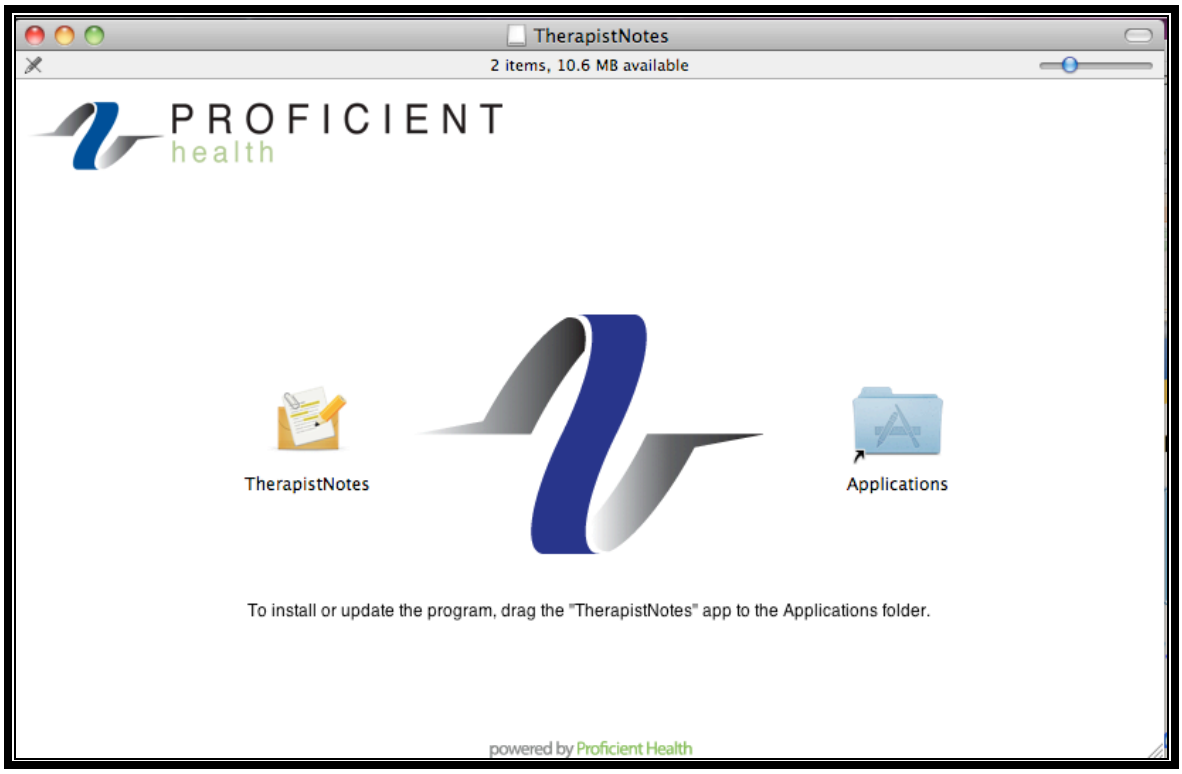
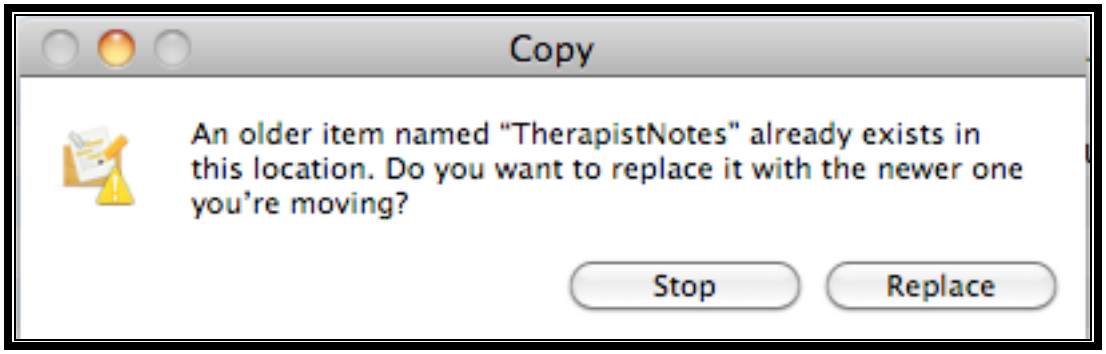


3. Drag the TherapistNotes.app file to your Applications folder. **Note: Replace the file with this new file if an old version exists.*


Copy
An older item named "TherapistNotes" already exists in this location. Do you want to replace it with the newer one you're moving?
Stop
Replace

4. Open the TherapistNotes application found in your Applications folder to launch.
5. The Mac will recognize that this file was downloaded from the internet and will prompt you to confirm. Click **Open** to continue or **Cancel** to exit.

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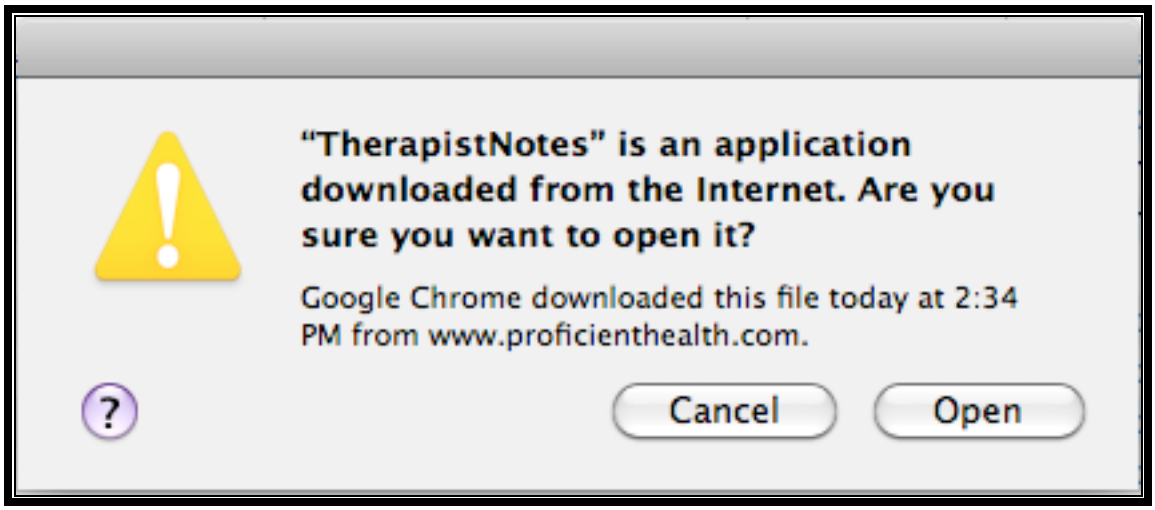
"TherapistNotes" is an application downloaded from the Internet. Are you sure you want to open it?
Google Chrome downloaded this file today at 2:34 PM from www.proficienthealth.com.
Cancel
Open

If a re-install of the Therapist Notes application is required, make sure to close your current session before installing.

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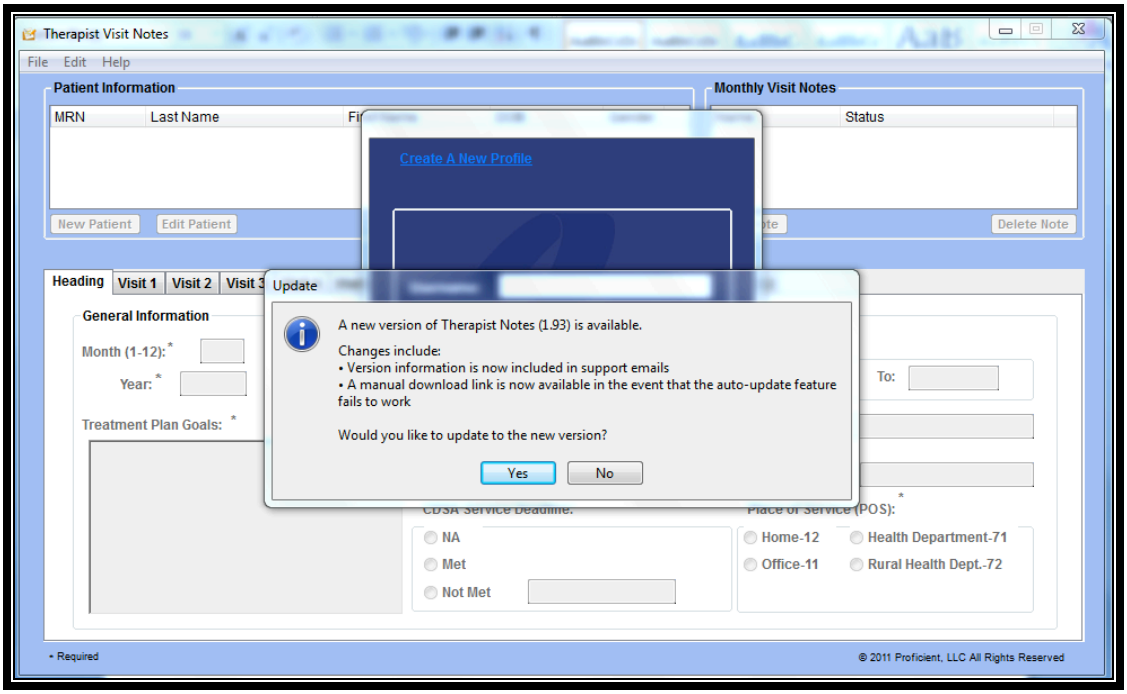
1.1 Therapist Notes Update

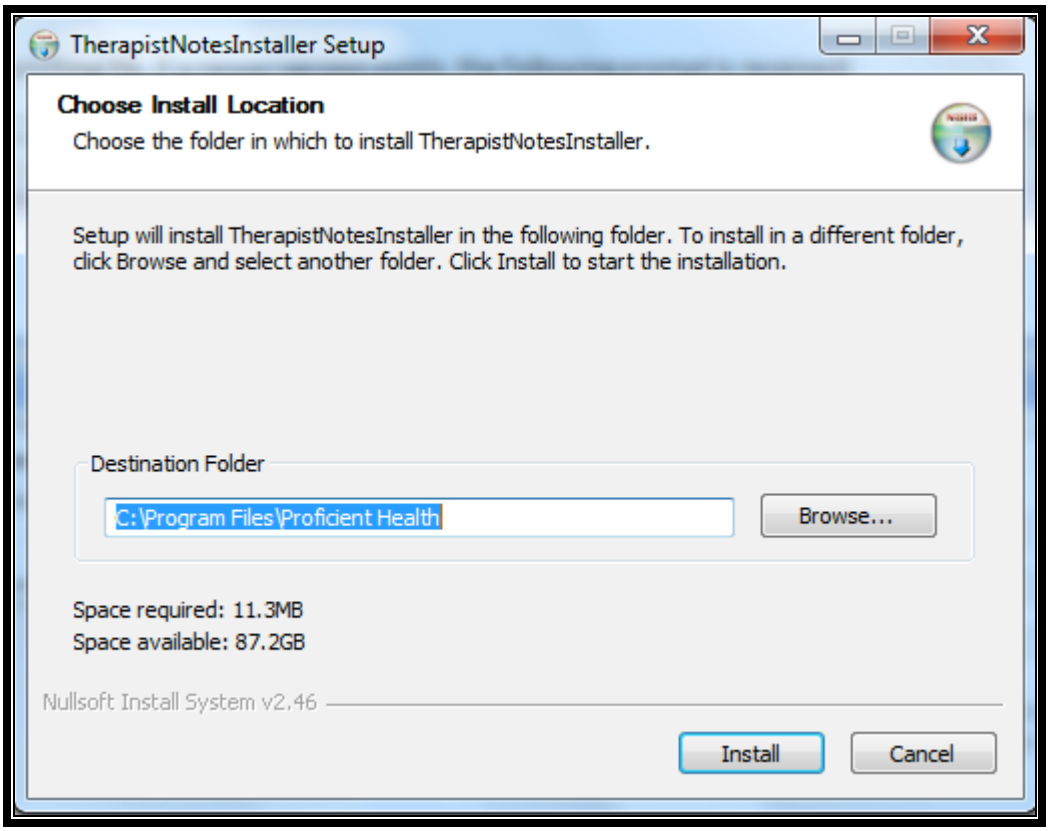
Periodic updates to the Therapist Notes application occur as a result of software enhancements. It is important to stay current on the application not only from a support standpoint but to prevent data integrity and/or sync issues during use. If a new version of Therapist Notes is pending download, the user will be presented with the following notification when launching the application:



To proceed with the upgrade:

1. Click **Yes** to continue. The Therapist Notes Installer Setup panel is displayed:

Note: To cancel the upgrade and use a previous version of Therapist Notes, click **No.*


TherapistNotesInstaller Setup
Choose Install Location
Choose the folder in which to install TherapistNotesInstaller.
Setup will install TherapistNotesInstaller in the following folder. To install in a different folder, click Browse and select another folder. Click Install to start the installation.
Destination Folder
C:\Program Files\Proficient Health
Browse...
Space required: 11.3MB
Space available: 87.2GB
Nullsoft Install System v2.46
Install
Cancel

2. Enter the desired **Destination Folder** in the space provided or click **Browse** to display the list of folders currently residing on the user's desktop or handheld device.

3. Click **Install** to continue. A progress panel will be displayed. To exit without upgrading click **Cancel**.

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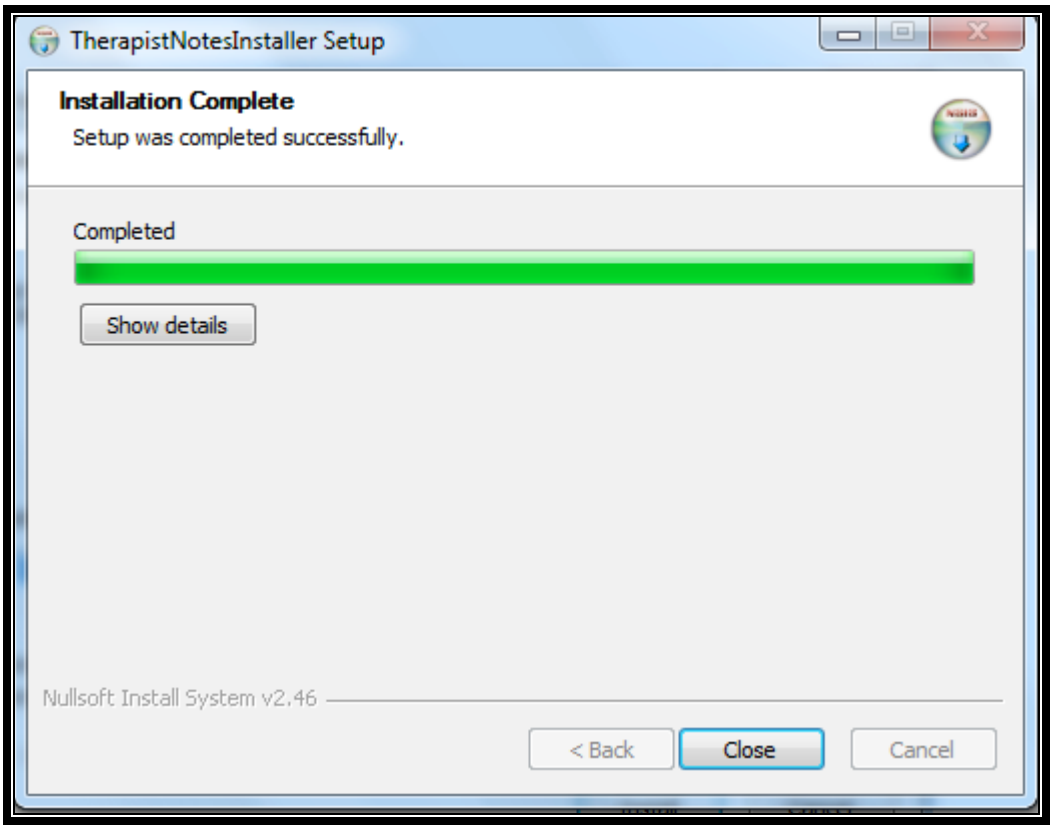

4. Click **Close** when the installation is complete. Therapist Notes has been updated to the most current version and is now available for use.

To confirm that the latest version of Therapist Notes is being used, do the following:

1. Click **Help** in the top, upper-left hand corner of the display;
2. Select **Check for Updates**;

If the latest version of Therapist Notes is being used, the following panel will be displayed:

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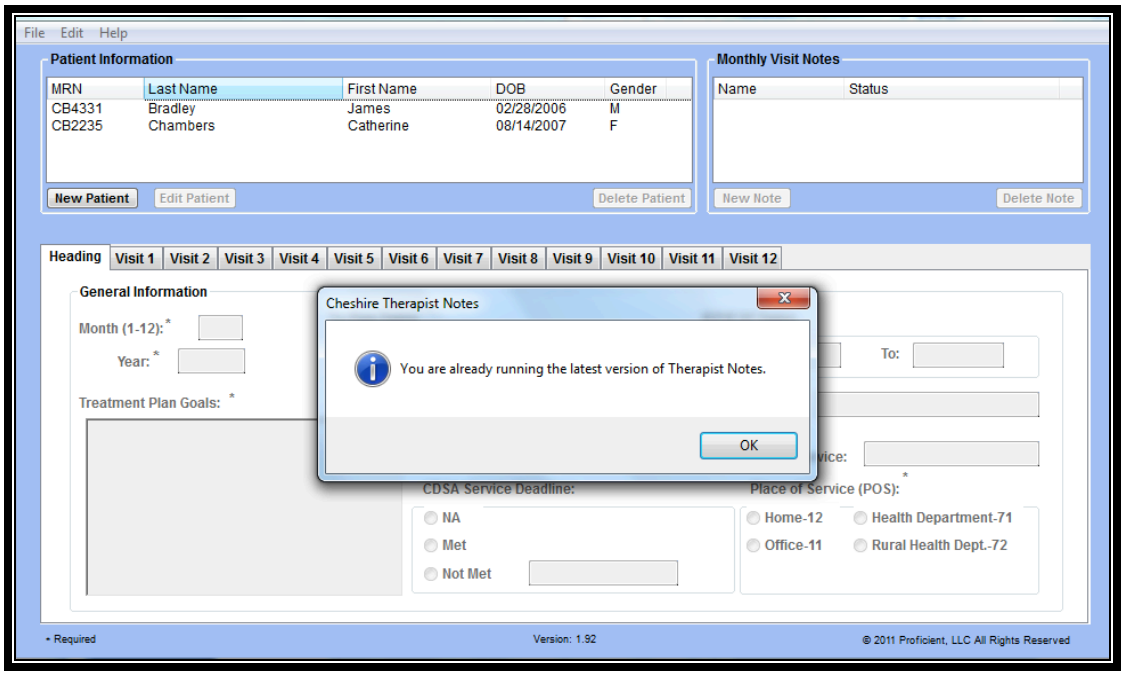


4. Click **OK** to continue;

**Note: If the latest version is not being used, a message will appear indicating that the version of Therapist Notes is outdated and requires an update. Simply follow the display prompts to update to the current version.*

1.2 Therapist Notes Troubleshoot

The Therapist Notes Troubleshoot feature allows users to apply corrections, or what is often referred to as patches, to the Therapist Notes application. Users will be instructed to apply these patches whenever they become available. To apply a patch, do the following:

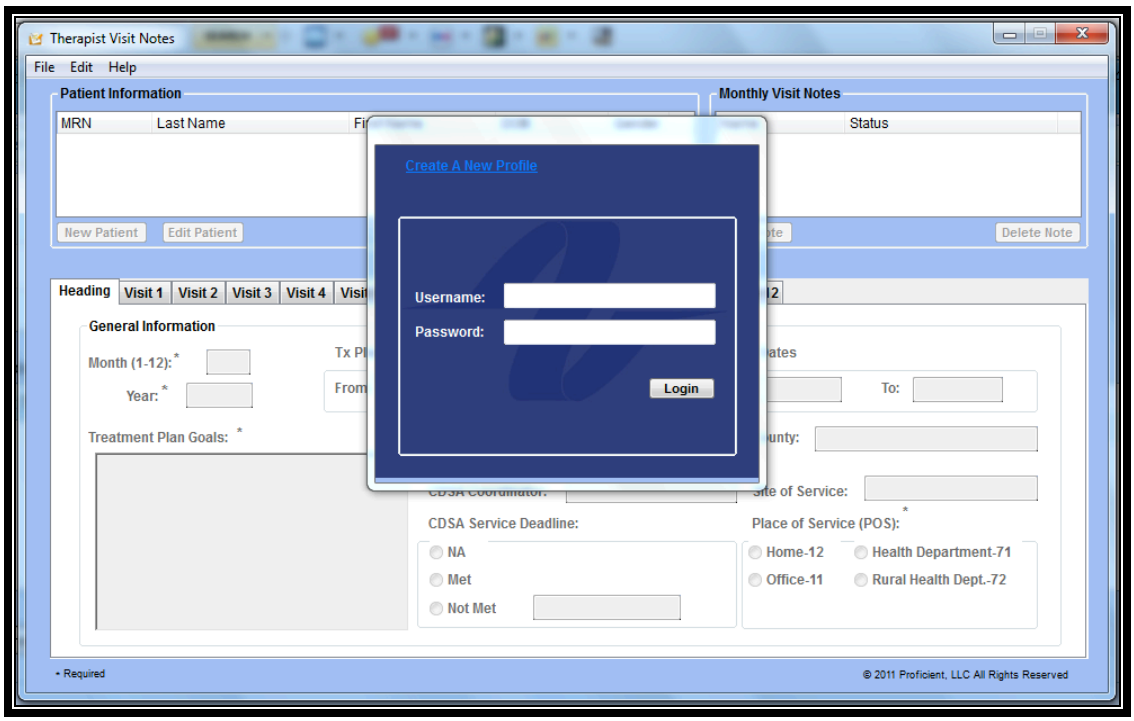
1. Click **Help** in the top, upper-left hand corner of the display;
2. Select **Troubleshoot**;
3. Select the respective patch to apply;
4. Follow the screen prompts to apply the patch;

A message will be displayed indicating that the patch was successfully applied.

5. Click **OK** to continue;

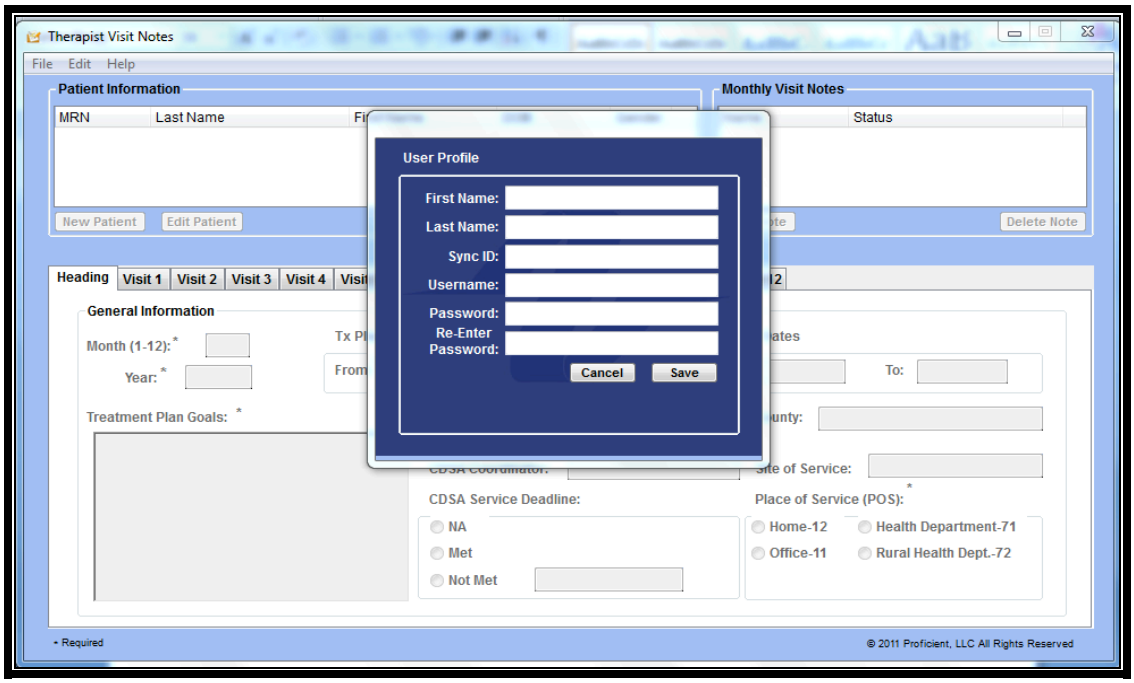
2.0 Accessing Therapist Notes

After launching the Therapist Notes application from the desktop the following panel is displayed:



2. Enter the **Username and Password**
3. Click **Login** to continue.

If this is the first time that the user has accessed Therapist Notes, a username and password must be created. Click on the link **Create A New Profile**. The following panel is displayed:



To create the username and password, do the following:

1. Enter the user's **First Name**;

2. Enter user's **Last Name**;

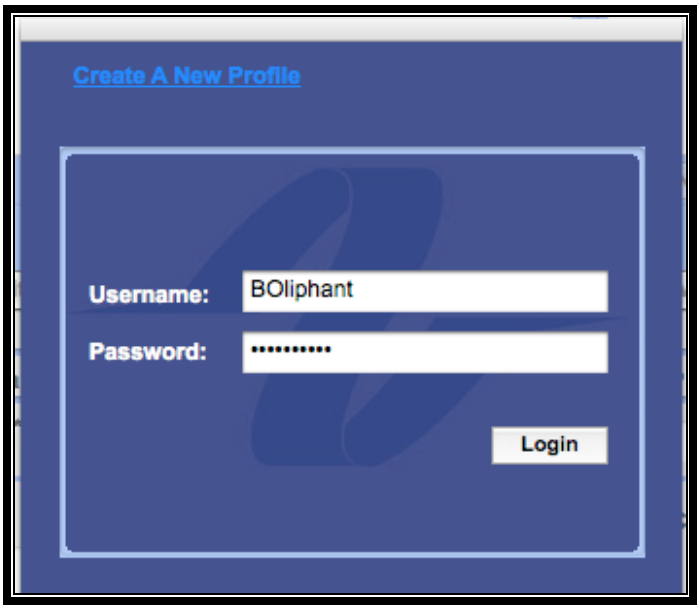
3. Enter the user's **Sync ID**.
   **Note: This is the same value as the user's Default Order Department that is assigned within Proficient Health*

4. Enter the desired **Username**.
   **Note: The suggested naming convention is one uppercase character and a minimum of five characters in length. The username and password should match what has been created in Proficient Health.*

5. Enter the desired **Password**.
   **Note: Passwords should contain at least one uppercase character, one number, and a minimum of six characters in length. It is recommended that the password match what has been used in Proficient Health.*

6. Re-enter the desired **Password** for confirmation.

7. To exit without creating a user profile click **Cancel**. To create the user profile and access Therapist Notes, click **Save**. The Therapist Notes login screen will be displayed.



8. Note that the Username and Password have been pre-filled. Click **Login** to continue.

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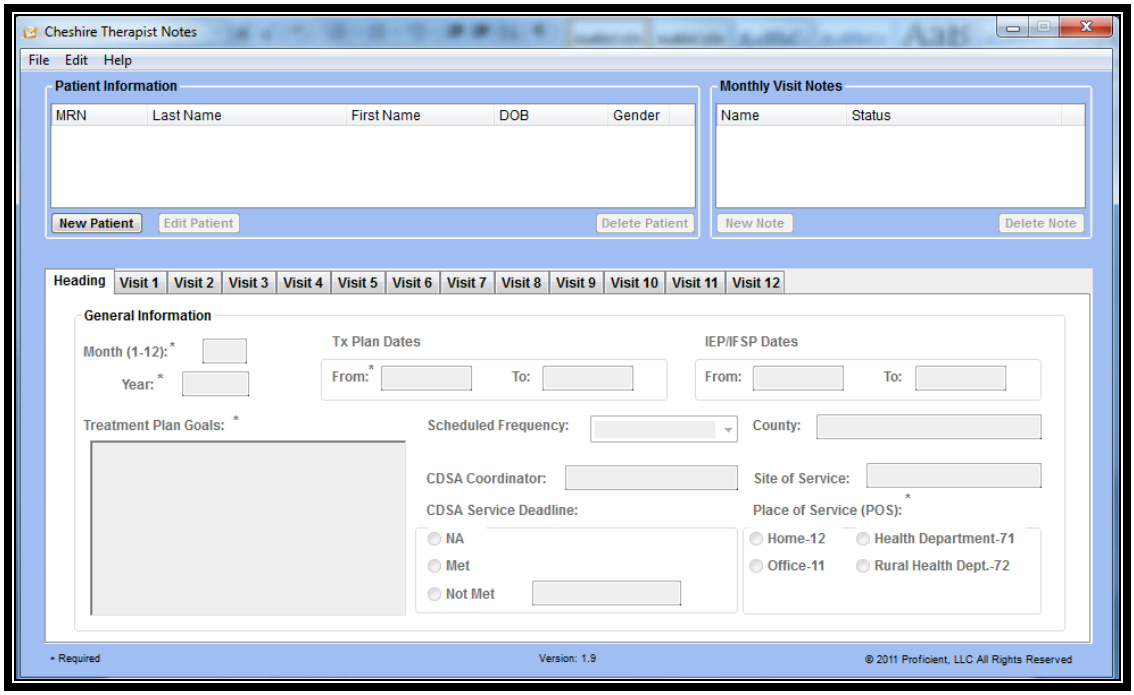
2.1 Navigation



The Therapist Notes display panel is broken down into four areas:

1. ***Patient Information*** – Used to maintain the patient/client database.

2. ***Monthly Visit Notes*** – Displays the current visit note and status for the patient/client.

3. ***Header and Detail Visit tabs*** – Used as a means to record the details of each therapy session with the patient/client.

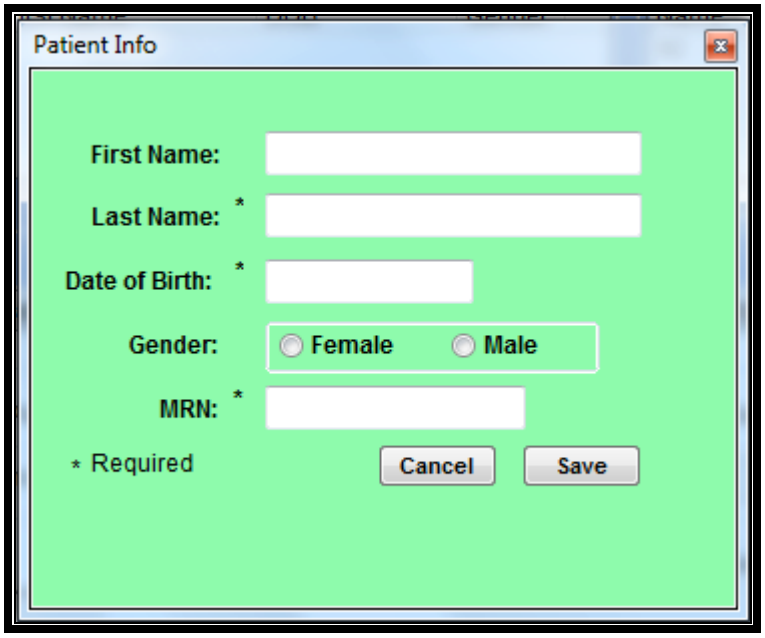
4. ***Menu bar*** – Located at the top, upper-left hand corner of the display panel, is used to:

   a. Synchronize patient/client visit notes to the Proficient Health database;
   b. Update user profile information;
   c. Request assistance with a support related issue (e.g. Sync errors);

3.0 Patient Information

The patient information for a patient/client must be established prior to entering a visit note within the Therapist Notes application. To add a new patient/client, do the following:

1. Click **New Patient**. The Patient Info panel is displayed:



2. Enter the patient/client's **First Name**, **Last Name**, **DOB**, **Gender**, and **MRN**.

   **Note: Fields denoted with an asterisk (*) are required fields. If a required field is left blank, a message will be displayed indicating the field in error.*

3. To create the new patient/client, click **SAVE**. To exit without creating the new patient/client click **CANCEL**.

The new patient/client being added must reside in the Proficient Health system before a successful sync will occur.

The Medical Record Number (MRN) and Date of Birth (DOB) for the patient/client must match what has been entered in the Proficient Health system before a successful sync will occur.

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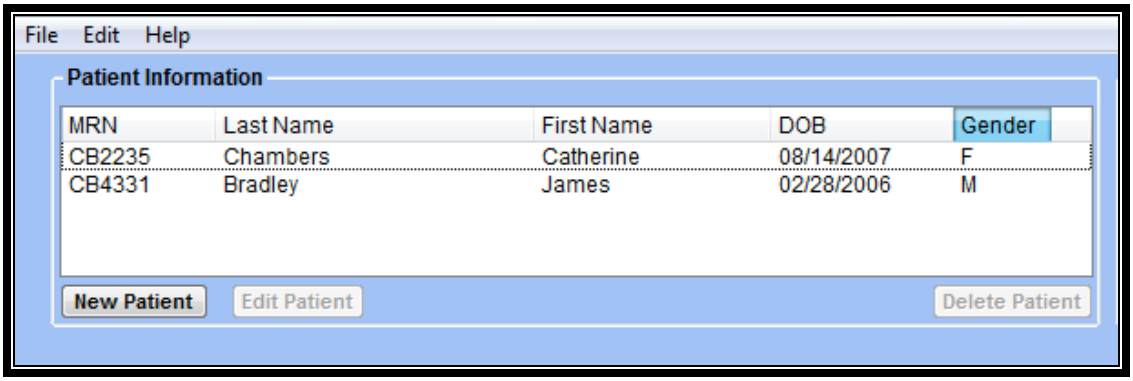
3.1 Managing Patient Information

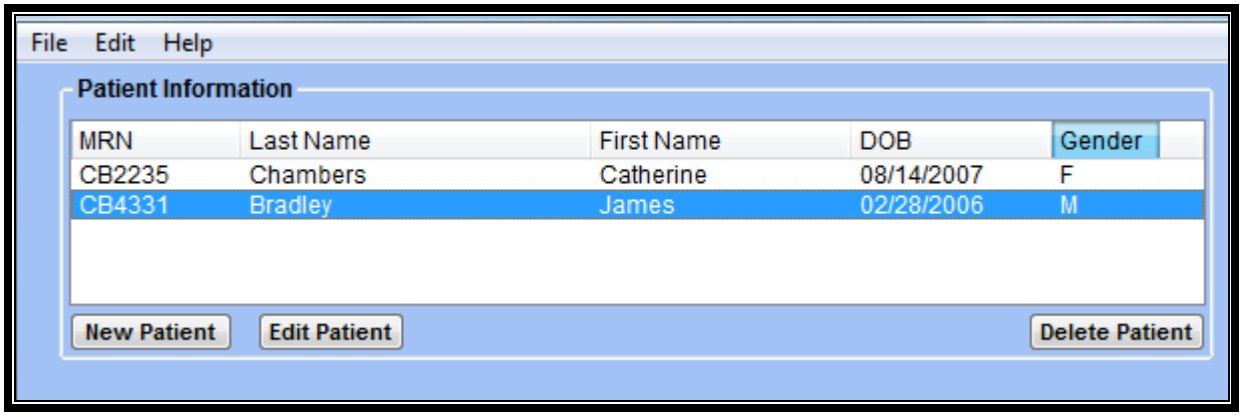
Patients/Clients can be quickly located under the Patient Information section by simply clicking in the column headings provided. This sorts the patient information in ascending and descending sequence. A scroll bar is also provided that allows the user to position to the desired patient/client.



3.2 Editing Patient Information

To update information on a patient/client, do the following:

1. Position to and highlight the patient/client record as shown:



2. Double-click on the highlighted patient/client or click **Edit Patient**. The Patient Info panel is displayed.

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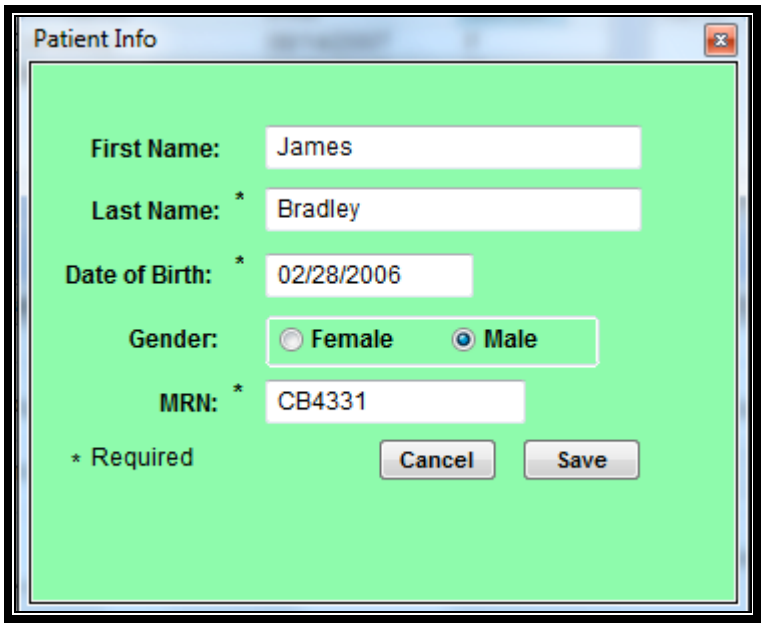
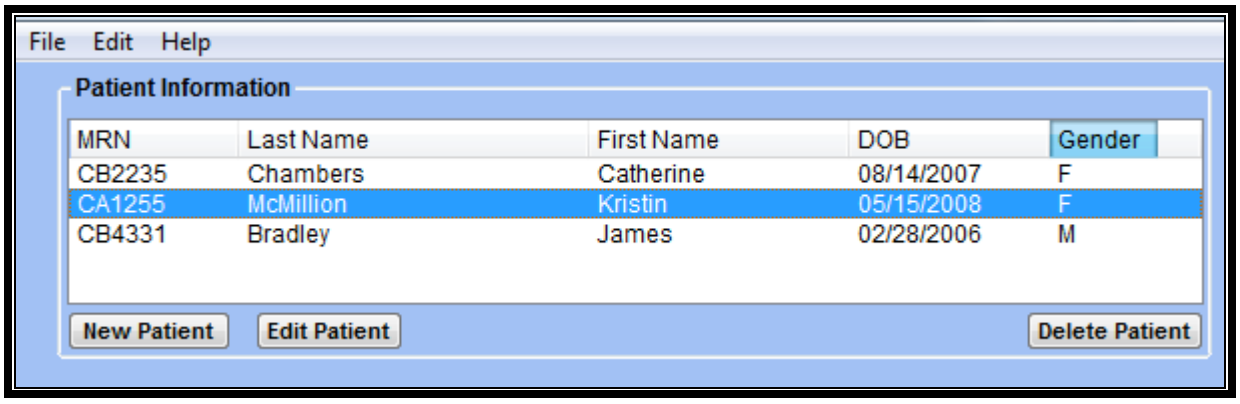


3. Update the desired fields and click **Save**. To cancel and return to the previous display click **Cancel**.

3.3 Deleting a patient

In some cases, a patient/client may need to be deleted from the Therapist Notes database. Prior to deleting any patient/client, it is recommended that the user sync the Therapist Notes database to prevent any lost of data. To delete a patient/client from the Therapist Notes database, do the following:

1. Position to and highlight the patient/client record as shown:



2. Click **Delete Patient**. A confirmation screen will appear as shown:

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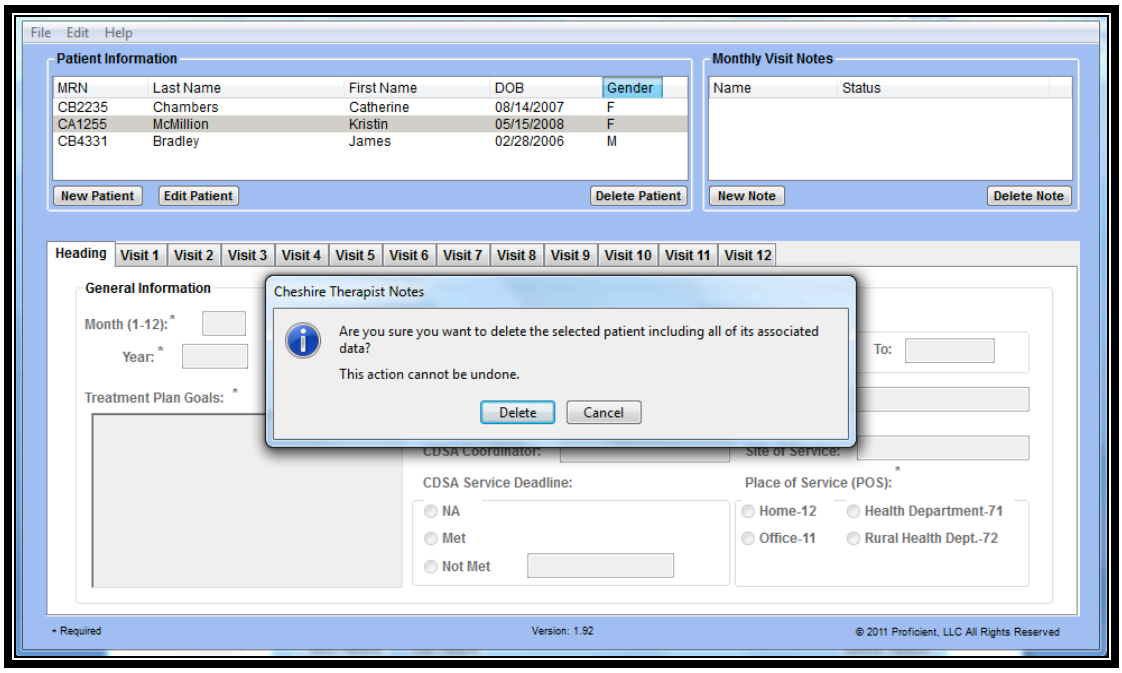

3. To confirm the delete, click **Delete**. To cancel and return to the previous screen, click **Cancel**.

All data that has not been synced will be lost when deleting a patient/client. Sync first!

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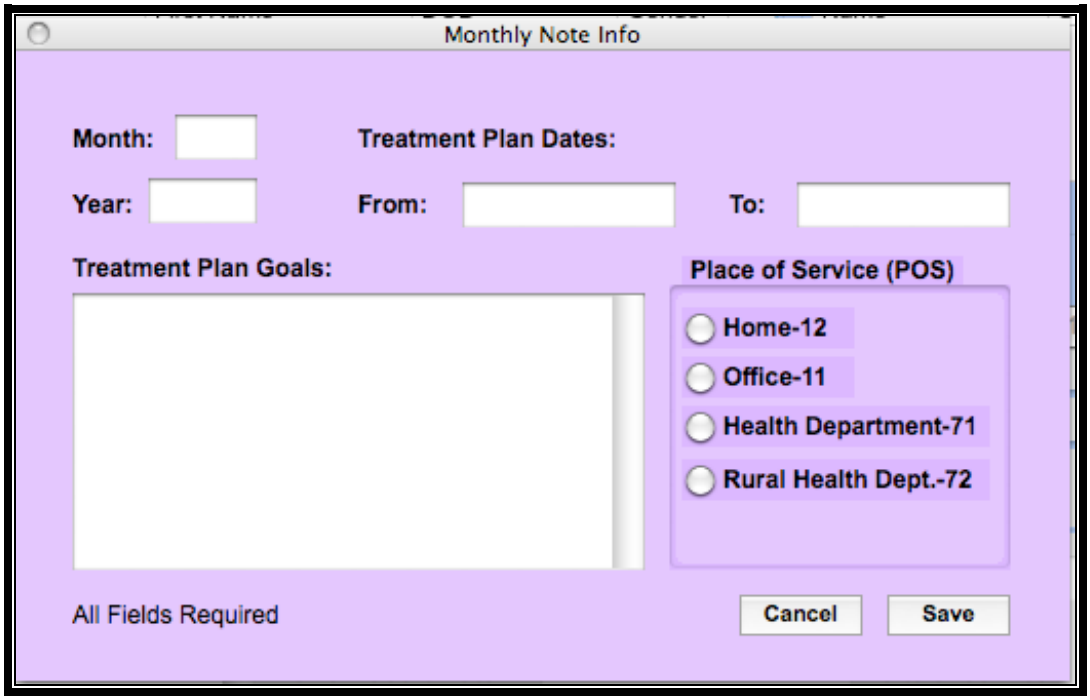
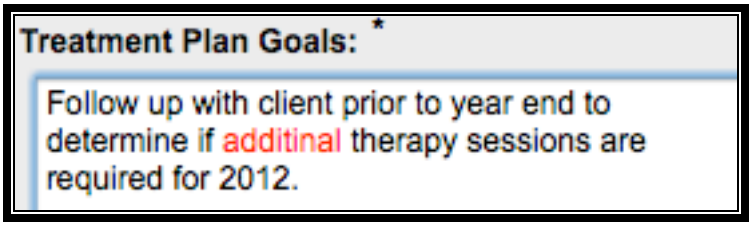
4.0 Creating a Visit Note

1. To enter a visit note, click **New Note**. The Monthly Note Info panel is displayed. This establishes the header portion of each visit note. It is required that a new visit note be created for each month.



2. Enter the **Month** in a MM format (i.e. 01, 11);
3. Enter the **Year** in a YYYY format (i.e. 2011);
4. Enter the **From** and **To Treatment Plan Dates** in MM/DD/YYYY format (i.e. 12/19/2011);
5. Enter the **Treatment Plan Goals**. **
6. Select the **Place of Service (POS)**;

** Indicates Automatic Spell Check is available for this field. If a misspelled word is found during entry, the misspelled word will be displayed in red as shown.


Treatment Plan Goals: *
Follow up with client prior to year end to determine if additinal therapy sessions are required for 2012.

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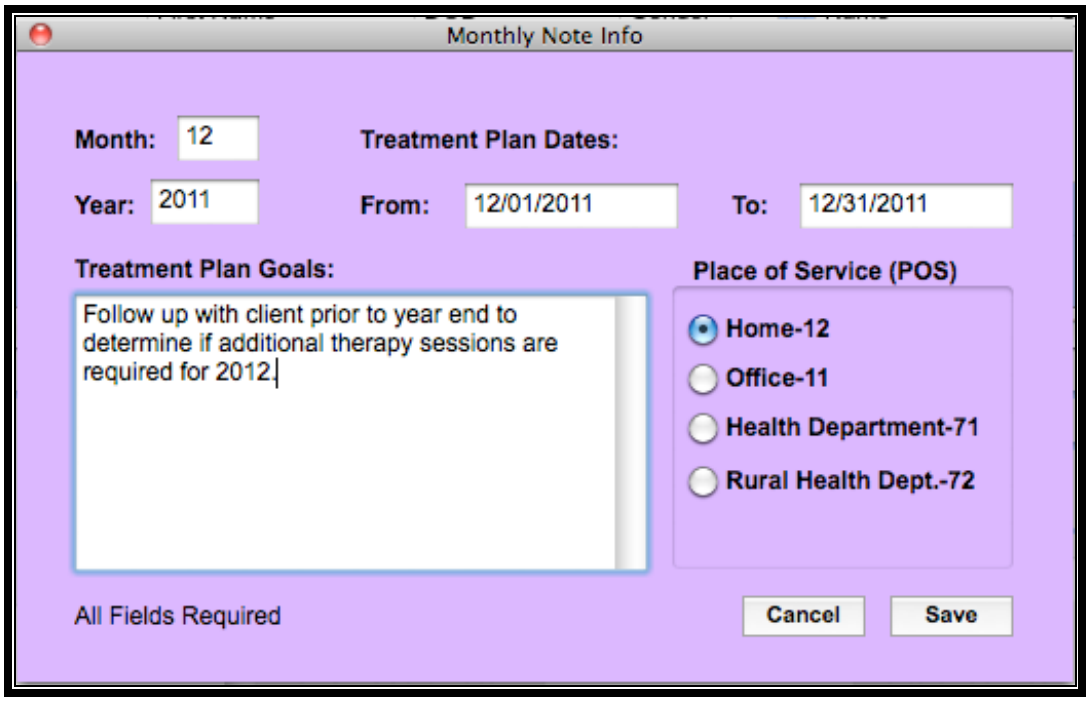

*Note all fields are required

7. To save the new note, click **Save**. To cancel and return to the previous screen, click **Cancel**.

   The heading of the visit note for this patient/client is then displayed, prompting the user to either complete the heading or enter the first visit note (e.g. Visit 1). Additional information, such as **IEP/IFSP Dates, Scheduled Frequency, County, CDSA Coordinator, CDSA Service Deadline, Site of Service, and Place of Service (POS)** related to the visit can be found under the Heading of the visit note.

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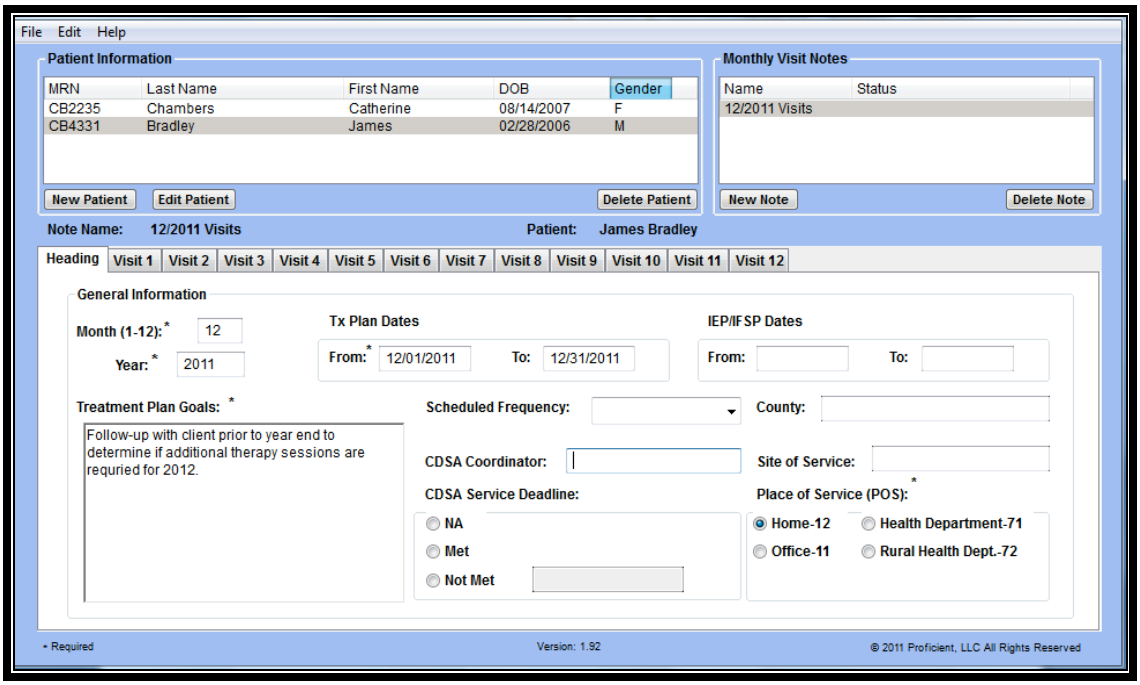

When you select a patient/client, if any visit notes exist they will be displayed in the Monthly Visit Notes panel.

4.1 Documenting a Patient Encounter

Documenting a patient/client encounter enables the Therapist to gauge therapeutic progression over a specified period of time. The information gathered from each encounter can be shared with the referring physician to determine the prognosis or desired plan of care for the patient/client. To document an encounter with a patient/client, do the following:

1. Click on the next available Visit tab. These are labeled one (1) through twelve (12) as shown above. The following panel is displayed:

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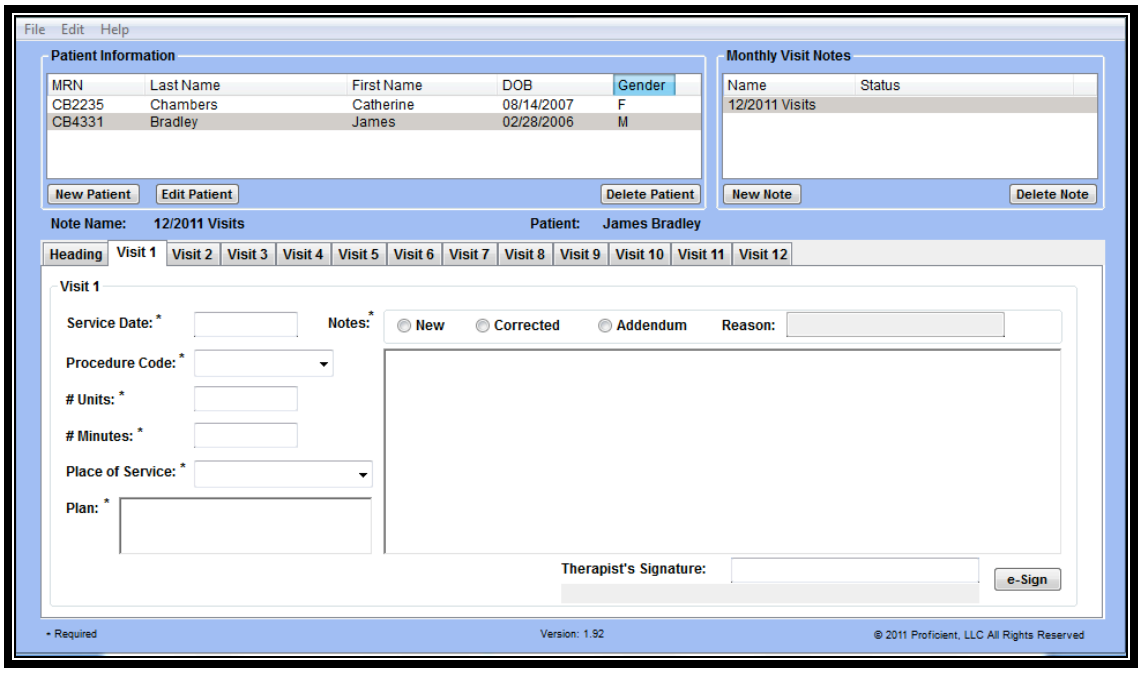
File Edit Help
Patient Information
MRN Last Name First Name DOB Gender
CB2235 Chambers Catherine 08/14/2007 F
CB4331 Bradley James 02/28/2006 M
New Patient Edit Patient Delete Patient
Monthly Visit Notes
Name Status
12/2011 Visits
New Note Delete Note
Note Name: 12/2011 Visits
Patient: James Bradley
Heading Visit 1 Visit 2 Visit 3 Visit 4 Visit 5 Visit 6 Visit 7 Visit 8 Visit 9 Visit 10 Visit 11 Visit 12
Visit 1
Service Date: *
Notes: *
New Corrected Addendum Reason:
Procedure Code: *
Units: *
Minutes: *
Place of Service: *
Plan: *
Therapist's Signature:
e-Sign
* Required
Version: 1.92
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2. Enter the **Service Date**. Note that this field is pre-populated with the current date.

3. Select a **Procedure Code** from the drop down list. Free text if this is a billing contract or if documenting an absence/contact.

4. Enter the **# of Units** (default is "1");

5. Enter the **# of Minutes** used during this therapy session;

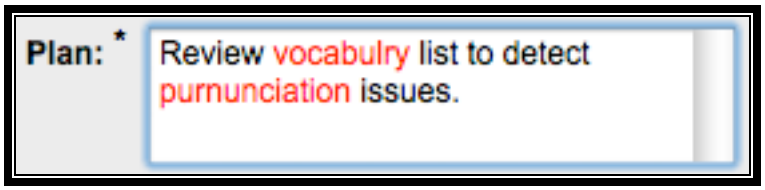
6. Select the **Place of Service (POS)** from the drop down list;

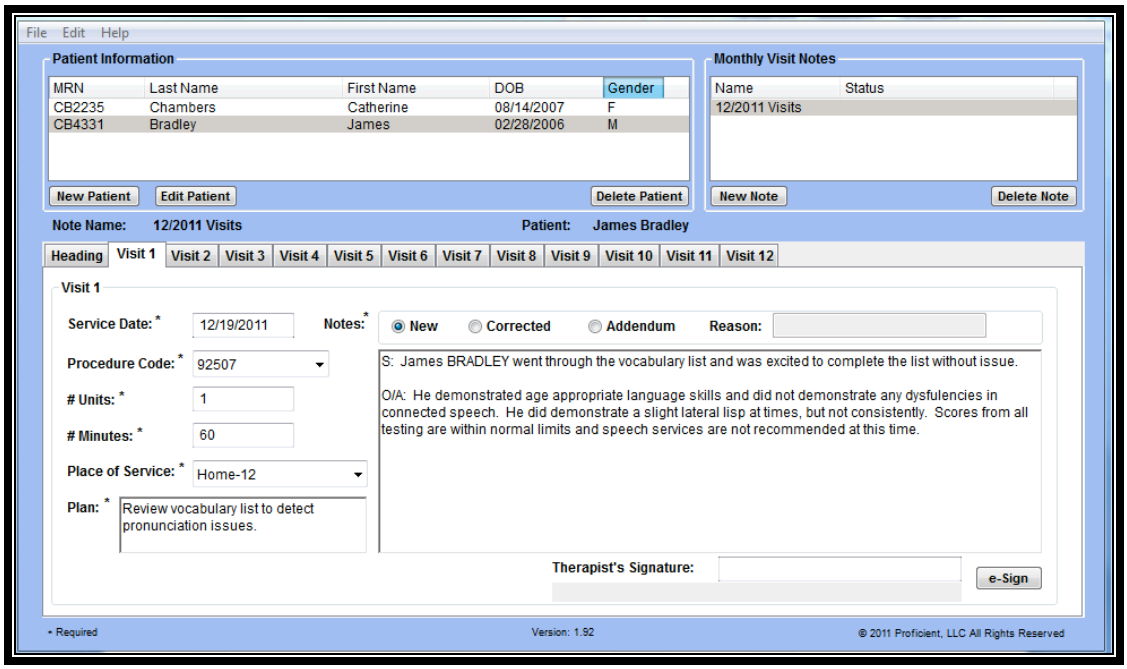
7. Enter the **Plan** objectives for the next therapy session; **

8. Select whether this visit note is **New**, **Corrected**, or an **Addendum**. If a correction is necessary, enter a reason in the space provided.

9. Enter the **Session Notes, Document Absence, or Client Contact** in the space provided on the right-hand side of the page. **

** Indicates Automatic Spell Check is available for this field. If a misspelled word is found during entry, the misspelled word will be displayed in red as shown.




File Edit Help
Patient Information
MRN Last Name First Name DOB Gender
CB2235 Chambers Catherine 08/14/2007 F
CB4331 Bradley James 02/28/2006 M
New Patient Edit Patient Delete Patient
Monthly Visit Notes
Name Status
12/2011 Visits
New Note Delete Note
Note Name: 12/2011 Visits
Patient: James Bradley
Heading Visit 1 Visit 2 Visit 3 Visit 4 Visit 5 Visit 6 Visit 7 Visit 8 Visit 9 Visit 10 Visit 11 Visit 12
Visit 1
Service Date: * 12/19/2011
Notes: * New Corrected Addendum Reason:
Procedure Code: * 92507
Units: * 1
Minutes: * 60
Place of Service: * Home-12
Plan: * Review vocabulary list to detect pronunciation issues.
S: James BRADLEY went through the vocabulary list and was excited to complete the list without issue.
O/A: He demonstrated age appropriate language skills and did not demonstrate any dysfulencies in connected speech. He did demonstrate a slight lateral lisp at times, but not consistently. Scores from all testing are within normal limits and speech services are not recommended at this time.
Therapist's Signature:
e-Sign
* Required
Version: 1.92
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4.2 Editing an Encounter

Visit Notes can be edited prior to the therapist's electronic signature. To edit a visit note, simply click on the appropriate tab and update as needed. All information entered or changed will be retained.

All data entered is saved immediately. Therefore, it is recommended that when making changes to use caution since there is no ability to cancel.

4.3 E-Sign a Visit Note

After entering a patient/client encounter and reviewing for content, the therapist has the option of electronically signing the visit note. By signing the visit note, the Therapist is agreeing that the encounter occurred and is accurate to his/her knowledge. Once this visit note has been signed, it is considered locked and no additional updates can be made. This also allows the note(s) to be synced to the Proficient Health system whenever a sync request is issued. To electronically sign the visit note, do the following:

1. Enter the therapist's name in the space provided. The name provided must match the First and Last Name that has been entered for the

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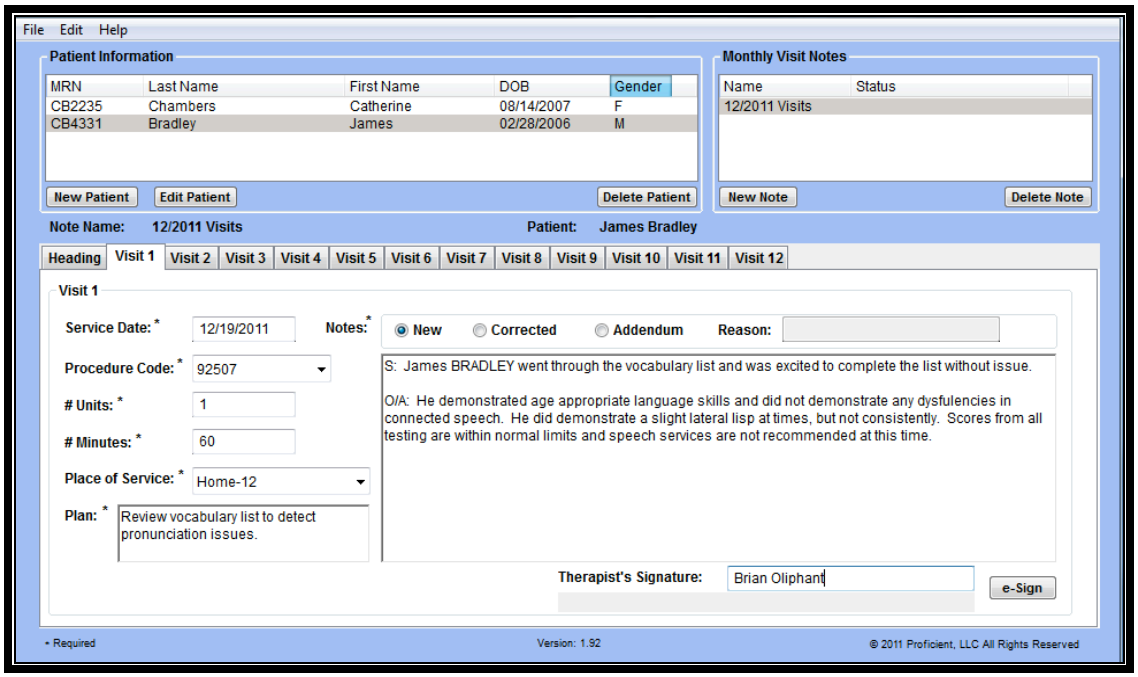
Therapist Note's user's profile. Therapists do not need to enter their credentials. These will be added when the note is synced.


File Edit Help
Patient Information
MRN Last Name First Name DOB Gender
CB2235 Chambers Catherine 08/14/2007 F
CB4331 Bradley James 02/28/2006 M
New Patient Edit Patient Delete Patient
Monthly Visit Notes
Name Status
12/2011 Visits
New Note Delete Note
Note Name: 12/2011 Visits
Patient: James Bradley
Heading Visit 1 Visit 2 Visit 3 Visit 4 Visit 5 Visit 6 Visit 7 Visit 8 Visit 9 Visit 10 Visit 11 Visit 12
Visit 1
Service Date: * 12/19/2011
Notes: * New Corrected Addendum Reason:
Procedure Code: * 92507
Units: * 1
Minutes: * 60
Place of Service: * Home-12
Plan: * Review vocabulary list to detect pronunciation issues.
S: James BRADLEY went through the vocabulary list and was excited to complete the list without issue.
O/A: He demonstrated age appropriate language skills and did not demonstrate any dysfulencies in connected speech. He did demonstrate a slight lateral lisp at times, but not consistently. Scores from all testing are within normal limits and speech services are not recommended at this time.
Therapist's Signature: Brian Oliphant
e-Sign
* Required
Version: 1.92
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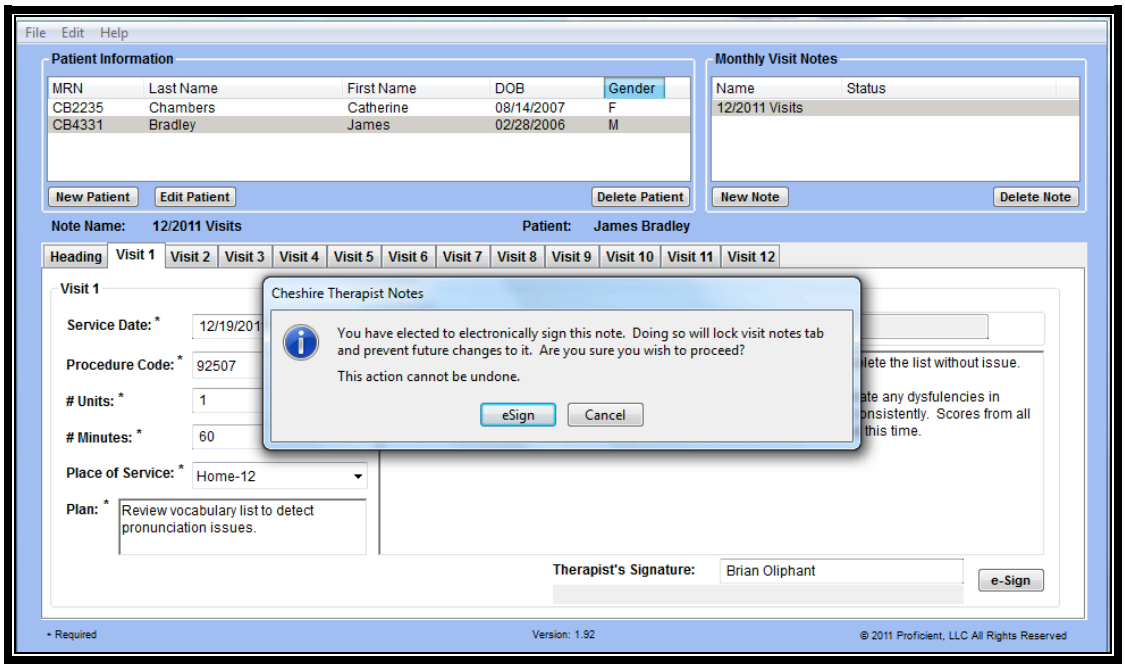
2. Click **e-Sign**. A confirmation panel will be presented as shown:


File Edit Help
Patient Information
MRN Last Name First Name DOB Gender
CB2235 Chambers Catherine 08/14/2007 F
CB4331 Bradley James 02/28/2006 M
New Patient Edit Patient Delete Patient
Monthly Visit Notes
Name Status
12/2011 Visits
New Note Delete Note
Note Name: 12/2011 Visits
Patient: James Bradley
Heading Visit 1 Visit 2 Visit 3 Visit 4 Visit 5 Visit 6 Visit 7 Visit 8 Visit 9 Visit 10 Visit 11 Visit 12
Visit 1
Cheshire Therapist Notes
You have elected to electronically sign this note. Doing so will lock visit notes tab and prevent future changes to it. Are you sure you wish to proceed?
This action cannot be undone.
eSign Cancel
Service Date: * 12/19/201
Procedure Code: * 92507
Units: * 1
Minutes: * 60
Place of Service: * Home-12
Plan: * Review vocabulary list to detect pronunciation issues.
Therapist's Signature: Brian Oliphant
e-Sign
* Required
Version: 1.92
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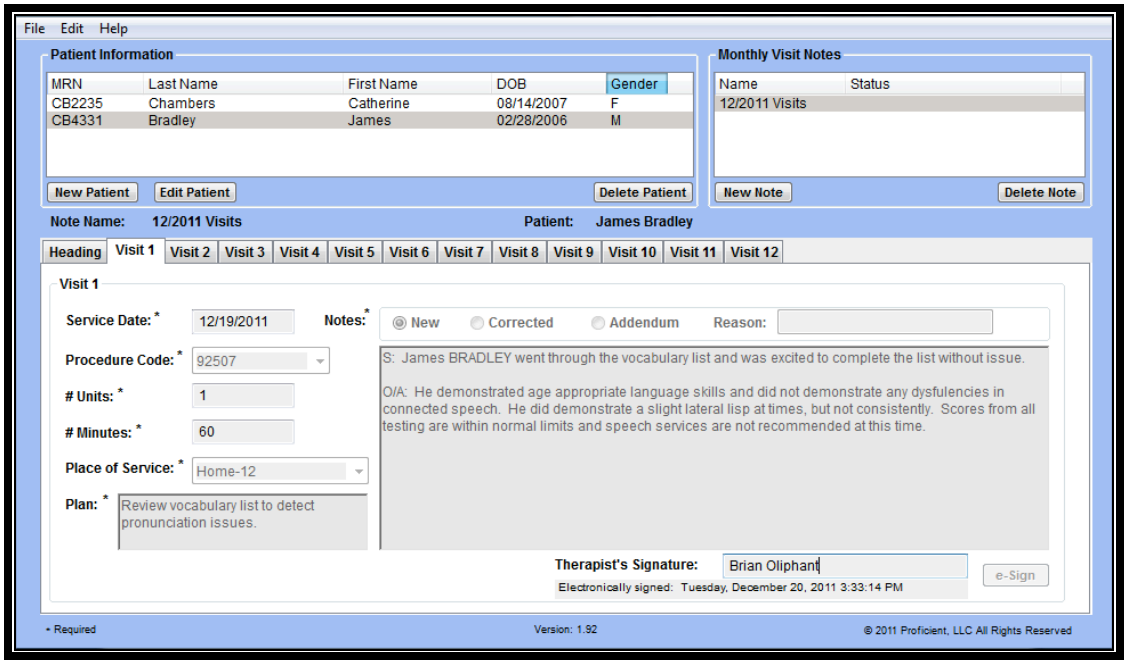
3. To confirm the signature, click **eSign**. To return to the previous screen, click **Cancel**.

Once e-signed, an electronic signature timestamp is displayed underneath the therapist's signature as shown:


File Edit Help
Patient Information
MRN Last Name First Name DOB Gender
CB2235 Chambers Catherine 08/14/2007 F
CB4331 Bradley James 02/28/2006 M
New Patient Edit Patient Delete Patient
Monthly Visit Notes
Name Status
12/2011 Visits
New Note Delete Note
Note Name: 12/2011 Visits
Patient: James Bradley
Heading Visit 1 Visit 2 Visit 3 Visit 4 Visit 5 Visit 6 Visit 7 Visit 8 Visit 9 Visit 10 Visit 11 Visit 12
Visit 1
Service Date: * 12/19/2011
Notes: *
New Corrected Addendum Reason:
Procedure Code: * 92507
Units: * 1
Minutes: * 60
Place of Service: * Home-12
Plan: * Review vocabulary list to detect pronunciation issues.
S: James BRADLEY went through the vocabulary list and was excited to complete the list without issue.
O/A: He demonstrated age appropriate language skills and did not demonstrate any dysfulencies in connected speech. He did demonstrate a slight lateral lisp at times, but not consistently. Scores from all testing are within normal limits and speech services are not recommended at this time.
Therapist's Signature: Brian Oliphant
Electronically signed: Tuesday, December 20, 2011 3:33:14 PM
e-Sign
* Required
Version: 1.92
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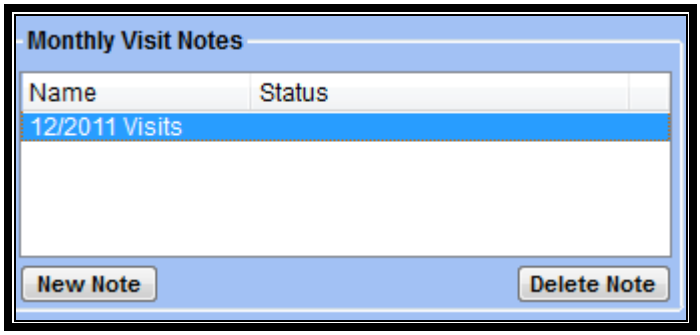
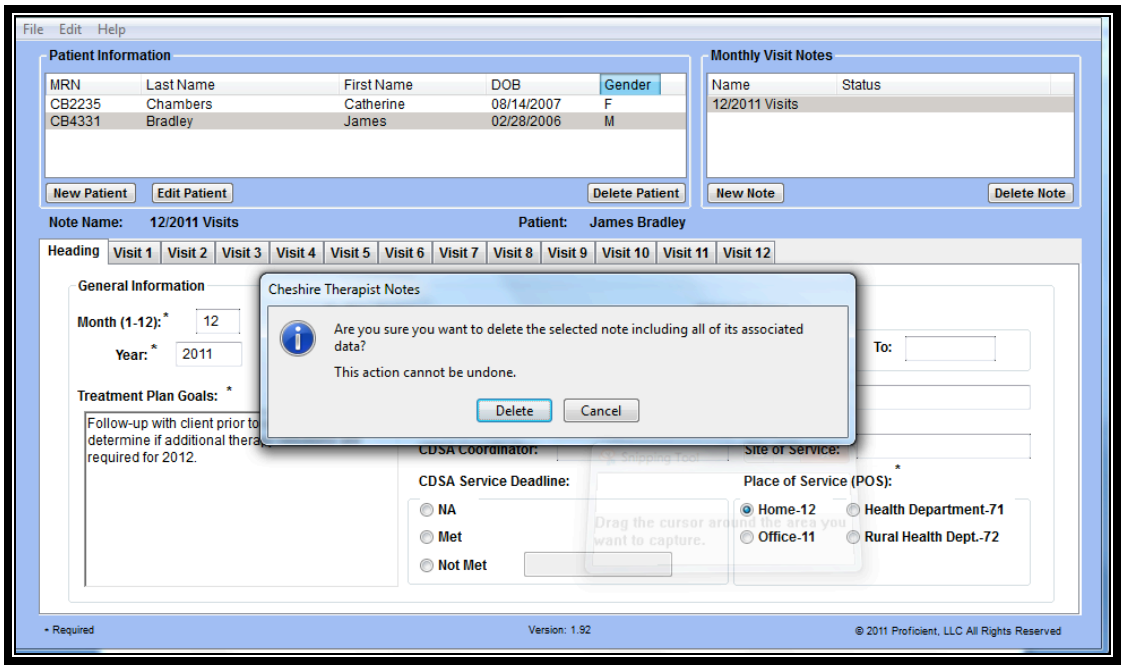
4.4 Deleting a Visit Note

Caution must be used when deleting a Visit Note. Once the note has been deleted it is not recoverable.

1. To delete a Visit Note, position to and highlight the note that needs to be deleted as shown:



2. Click **Delete Note**. A confirmation panel will be displayed as shown:


File Edit Help
Patient Information
MRN Last Name First Name DOB Gender
CB2235 Chambers Catherine 08/14/2007 F
CB4331 Bradley James 02/28/2006 M
New Patient Edit Patient Delete Patient
Monthly Visit Notes
Name Status
12/2011 Visits
New Note Delete Note
Note Name: 12/2011 Visits
Patient: James Bradley
Heading Visit 1 Visit 2 Visit 3 Visit 4 Visit 5 Visit 6 Visit 7 Visit 8 Visit 9 Visit 10 Visit 11 Visit 12
General Information
Month (1-12):* 12
Year:* 2011
Treatment Plan Goals:*
Follow-up with client prior to
determine if additional thera
required for 2012.
Cheshire Therapist Notes
Are you sure you want to delete the selected note including all of its associated data?
This action cannot be undone.
Delete Cancel
To:
CDSA Coordinator:
Site of Service:
CDSA Service Deadline:
Place of Service (POS):*
NA
Met
Not Met
Home-12
Office-11
Health Department-71
Rural Health Dept.-72
Drag the cursor around the area you want to capture.
* Required
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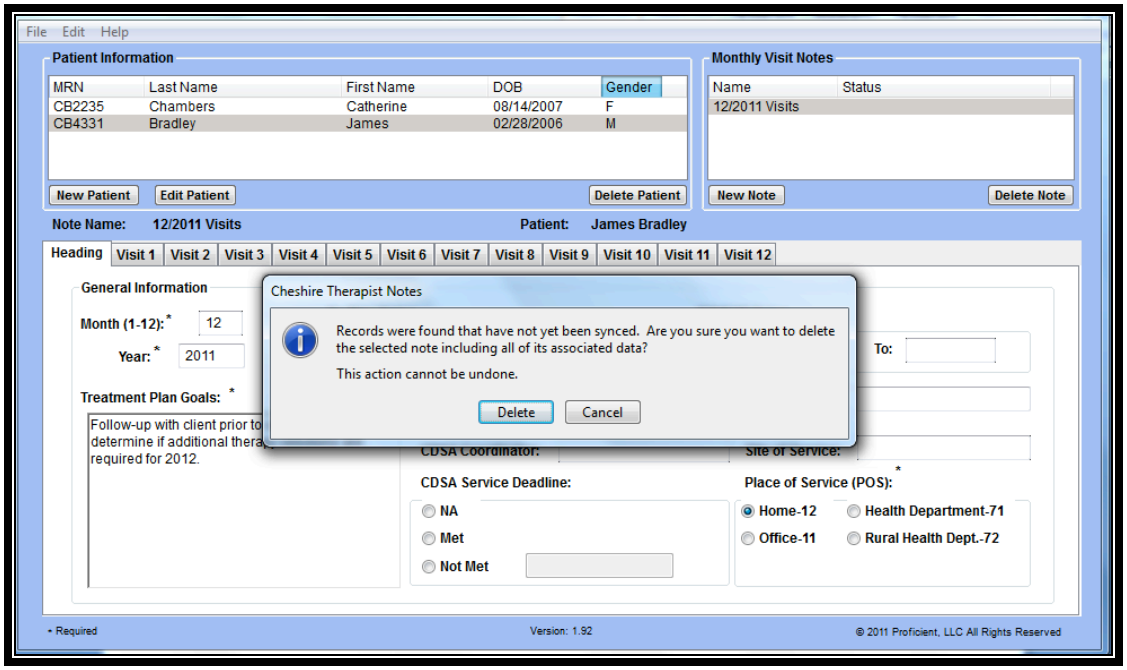
3. To confirm the delete, click **Delete**. To return to the previous screen click **Cancel**.

**Note: Prior to deleting notes from the Therapist Notes application, double-check the Proficient Health database to verify that all notes have synced.*


File Edit Help
Patient Information
MRN Last Name First Name DOB Gender
CB2235 Chambers Catherine 08/14/2007 F
CB4331 Bradley James 02/28/2006 M
New Patient Edit Patient Delete Patient
Monthly Visit Notes
Name Status
12/2011 Visits
New Note Delete Note
Note Name: 12/2011 Visits
Patient: James Bradley
Heading Visit 1 Visit 2 Visit 3 Visit 4 Visit 5 Visit 6 Visit 7 Visit 8 Visit 9 Visit 10 Visit 11 Visit 12
General Information
Month (1-12):* 12
Year:* 2011
Treatment Plan Goals:*
Follow-up with client prior to
determine if additional thera
required for 2012.
Cheshire Therapist Notes
Records were found that have not yet been synced. Are you sure you want to delete the selected note including all of its associated data?
This action cannot be undone.
Delete Cancel
To:
CDSA Coordinator:
Site of Service:
CDSA Service Deadline:
Place of Service (POS):*
NA
Met
Not Met
Home-12
Office-11
Health Department-71
Rural Health Dept.-72
* Required
Version: 1.92
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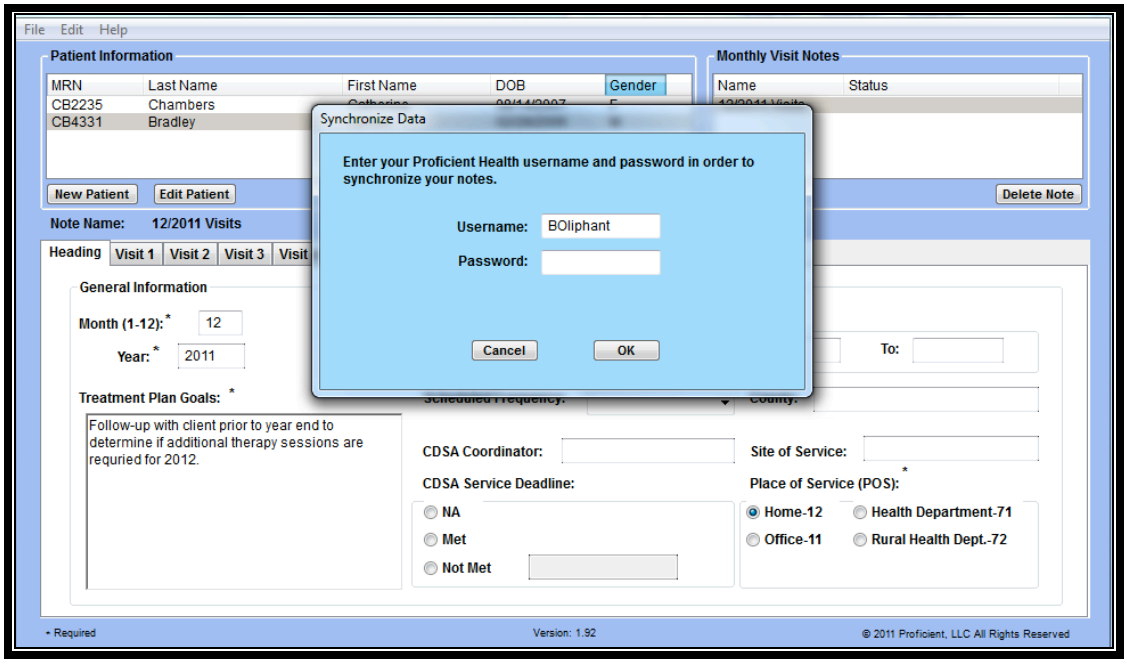
To confirm the delete, click **Delete**. To cancel and return to the previous screen, click **Cancel**.

5.0 Syncing Visit Notes

When all visit notes have been electronically signed for each patient/client, Therapist can sync this information to the Proficient Health database for billing and medical record purposes. To sync visit notes, do the following:

1. Click **File** in the top, upper-left hand corner of your screen;
2. Tab or click on **Synchronize** in the drop down list. The following login panel is displayed:



3. Enter your Proficient Health **Username** and **Password**;
4. To continue with the synchronization process, click **OK**. To return to the previous screen, click **Cancel**.

During the synchronization process user authentication, and the patient/client's Name, DOB, and MRN defined in the Therapist Notes will be compared to what has been defined in the Proficient Health database. If the sync of the visit notes was successful, a message will be displayed.

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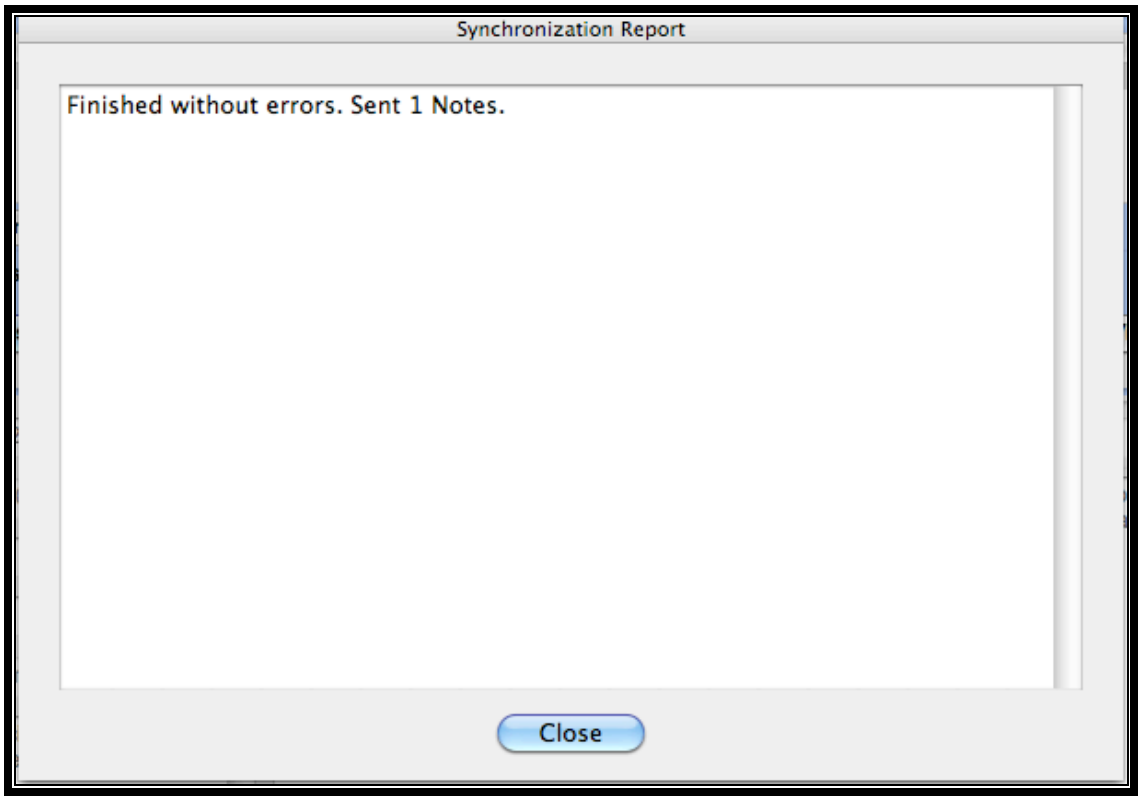
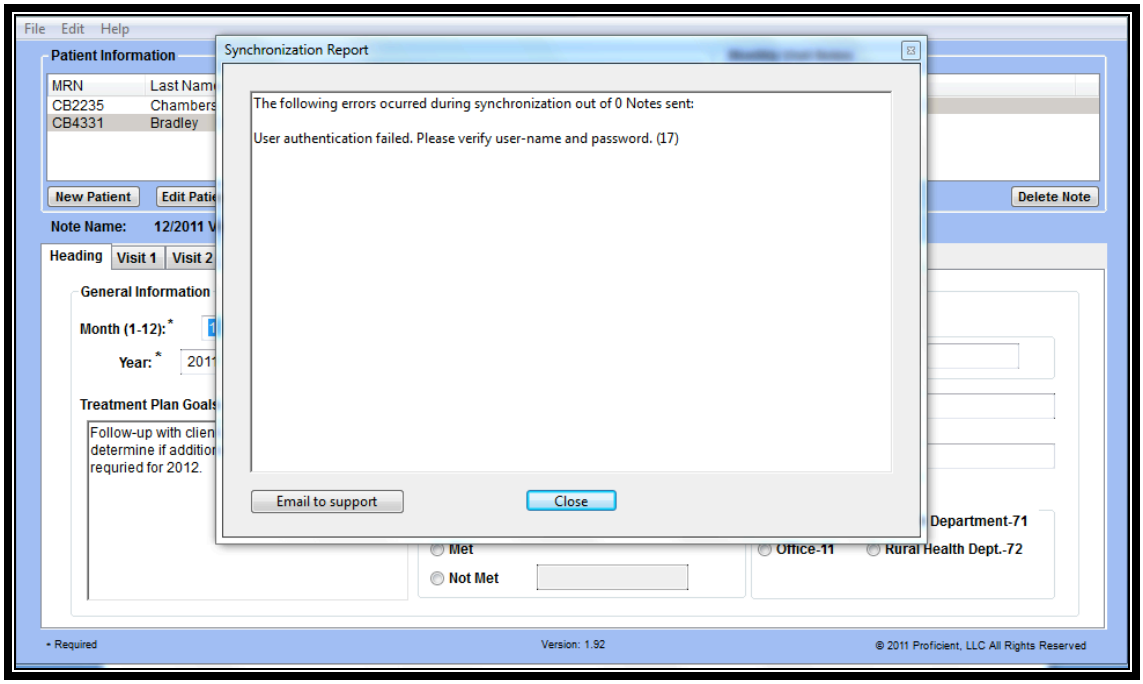


If an error occurs during the sync process, a screen is displayed with error codes. Below is an example of an error notification received during the sync process:



Error Codes

Error Code	Message Indicator
10	DOB is incorrect for the patient/client
11	MRN is incorrect for the patient/client
12	The patient/client could not be found in the Proficient Health database.
13	
14	
15	
16	The Department could not be found in the Proficient Health database.
17	User authentication failed – The user name and password do not match what has been defined in the Proficient Health database.
18	Duplicate patient/client found in the Proficient Health database.

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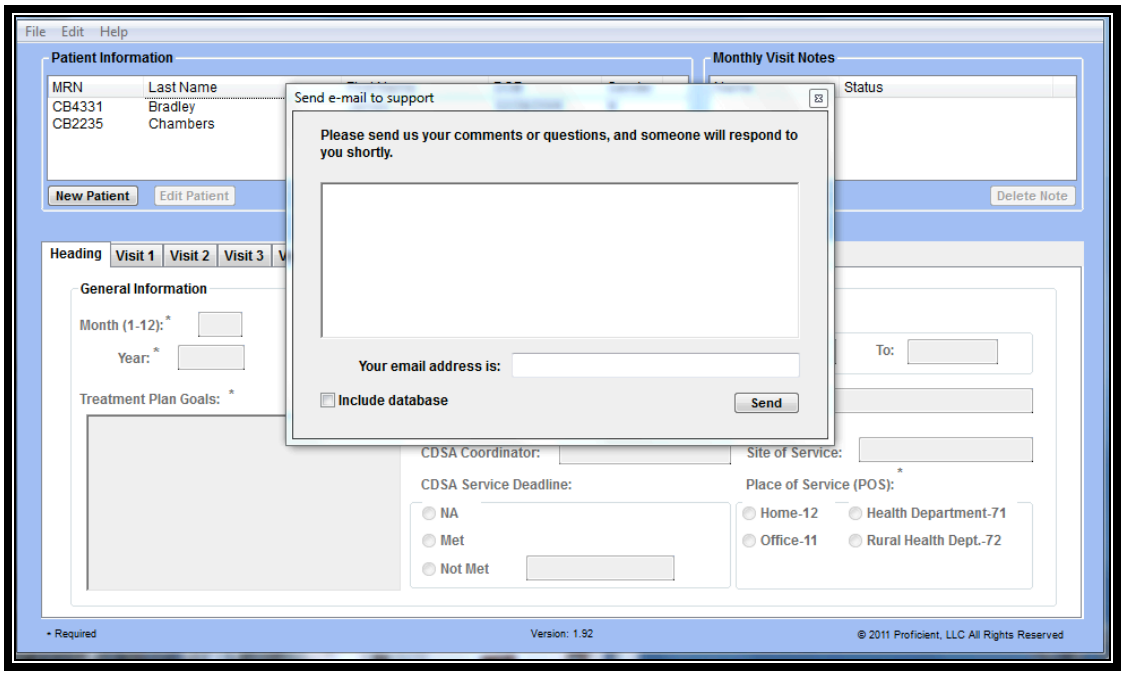
6.0 Contacting Support

If the user is unable to resolve the sync error and desires to contact Proficient Health for additional support, he/she can click on **Email to support** from the Synchronization Report panel. The following panel will be displayed:



1. Enter the comment or question;
2. Email address;
3. Selection to include/exclude the Therapist Notes database. This allows the user to send a copy of their database to Support for review.
4. When complete, click **Send**.

This email will notify Support of the error(s) being received during the synchronization process. A Support representative will review the email and respond with the desired resolution.

Note: Users can also contact Support by clicking on **Help in the top, upper-left hand corner of the display. Tab to **Contact Support** and select. Follows steps 1 – 4 as shown above.*

To receive additional assistance with the Therapist Notes application include:

1) Contact Proficient's Support via email at support@proficienthealth.com.

7.0 Acronyms and Terminology

Term	Definition
CDSA	Children's Developmental Service Agency
CDSA Coordinator	Person who coordinates services (Physical Therapy, Occupational Therapy, Speech Therapy, Developmental Therapy etc) for the birth-3 population.
CDSA Deadline	Services outlined in an IFSP must be started within 30 days of when the IFSP is signed.
CMS	Content Management System.
Department	Refers to a location, department, fax line or workgroup within an organization. This could also refer to a work list, work queue, or pattern.
e-Sign	Electronic signature by the therapist that contains a date timestamp.
HIPAA	Health Insurance and Portability and Accountability Act - Regulates the use and disclosure of an individual's health information.
IEP	Individualized Education Plan
IFSP	Individualized Family Service Plan
MRN	Medical Record Number
PHI	Protected Health Information
Sync	The transmission or upload of data from a PC, laptop, or handheld device (e.g. iPad) to the Proficient Health application.
Sync ID	Refers to the Default Order Department defined for a user within the Proficient Health application. Also a unique number that is assigned per therapist.
Visit	A meeting between a therapist and a patient/client for specified period of time.
Visit Note	Documenting the interaction between the therapist and patient/client.

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**** * * N O T E S * * ****

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